



DHCS APPLICATION PORTAL SECURITY GROUP OWNERS MANUAL

May 09, 2019

VERSION 0.04

Revision History

Version Number	Date	Description
0.01	04/25/2018	First iteration of working rough draft
0.02	05/07/2018	Final initial draft
0.03	05/21/2018	Updated based on changes made to Security Group permissions
0.04	05/01/2019	Updated to post to DHCS Application Portal

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Introduction

Purpose

This document describes the steps for users that are Security Group Owners in Azure Active Directory (AAD) to Add and Remove Members from Security Groups.

Roles and Responsibilities

Currently, a Security Group Owner can perform the following operations.

1. Add members
2. Remove member(s)
3. **Edit details (do not perform this action)**
4. **Delete group (do not perform this action)**

However, security group owners shall **NOT** Edit Group details or Delete a Group. Editing or deleting a group will result in revocation of Security Group owner permissions.

Security Group owners are responsible for completing Access Reviews. Access Reviews are performed to ensure that users who were invited and/or added to a group and/or application continue to need access. As a Security Group owner, you must complete any and all Access Review requests in a timely manner. If Access Reviews are not completed in time, members will be removed from the Security Group and members will not be able to access DHCS applications, associated to the security group.

View Group Information

1. Go to the DHCS Application Portal at <https://portal.dhcs.ca.gov>

2. Click Login.

For more detailed steps on how to login, refer to the “User Manual” document on the home page.

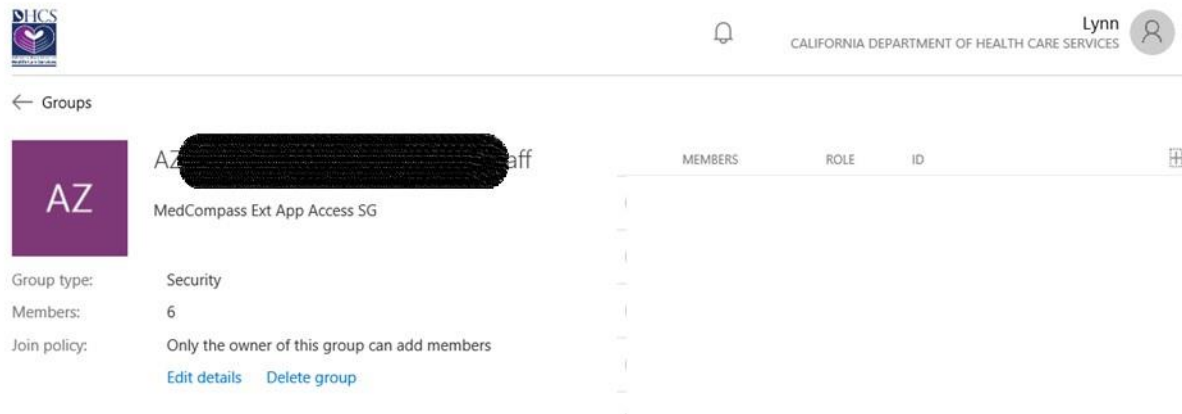
3. On Apps Page, Click Groups tile

NOTE: On the Groups page, under Groups I own column, if you do not see any groups listed, you are not an owner of any Security Groups and this document does not apply to you.

The image shows two screenshots of the DHCS Application Portal. The top screenshot displays the 'Apps' page, which includes a search bar, a '+ Add app' button, and a grid of application tiles: Calendar, Outlook, Tasks, MedCompass-ORT, MedCompass-UAT, People, and Tableau-ORT. A 'Groups' tile is also visible. The bottom screenshot displays the 'Groups' page, which includes a search bar and two columns: 'Groups I own' and 'Groups I'm in'. The 'Groups I own' column shows a group named 'AZ' with a redacted name. The 'Groups I'm in' column shows a group named 'A' with a redacted name. Both screenshots show the user 'Lynn' logged in as the 'CALIFORNIA DEPARTMENT OF HEALTH CARE SERVICES'.

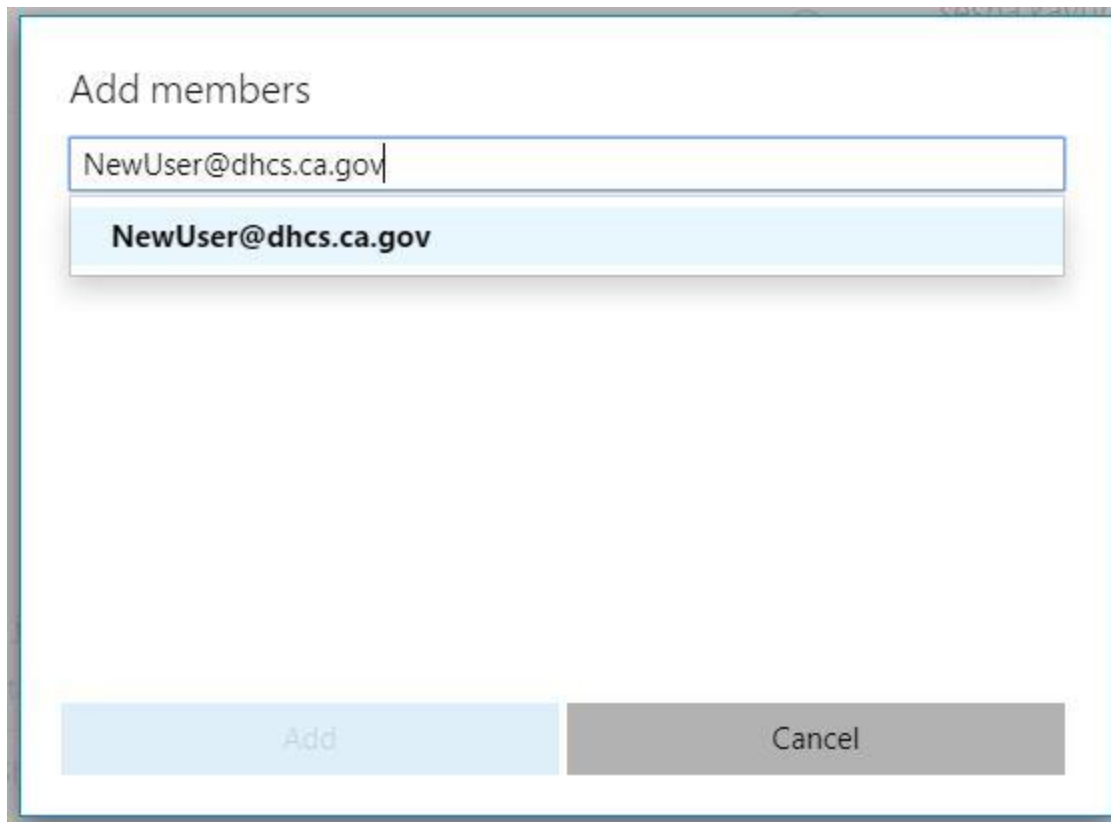
Add a Member

1. On the Groups page, from the **Groups I own** column, select the group you want to add member(s) to
2. On the specific security group page, click +.



3. Enter the member's Email Address and Click Add

The screenshot shows a dialog box titled 'Add members'. It features a search input field with the placeholder text 'Search by name or email'. At the bottom of the dialog, there are two buttons: 'Add' (light blue) and 'Cancel' (gray).



Add members

NewUser@dhcs.ca.gov

NewUser@dhcs.ca.gov


Add Cancel

4. If the member is external to DHCS, a message box is displayed. You can add a message in this box (Optional).

An invitation email will be sent if the member is external to DHCS.
If the member is internal to DHCS, an invitation email is not sent.

Add members

NewUser@dhcs.ca.gov

 NewUser@dhcs.ca.gov External user ...

Hello,

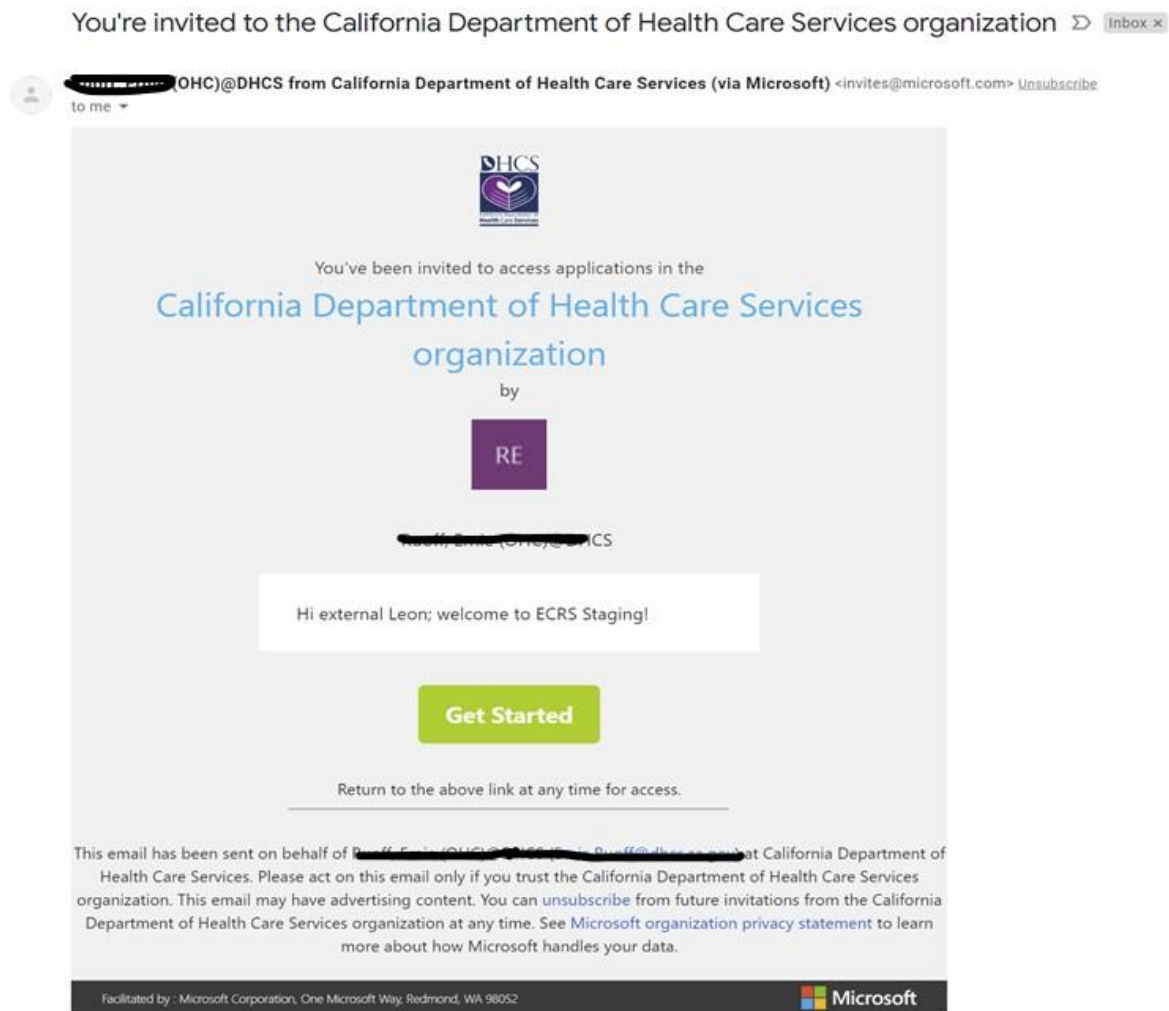
I have granted you the "Analyst" role for the "ABC" Application .

Add Cancel

5. Returned to the Groups page.

New member added is now listed in Group and Role is currently noted as Invited.


When a new external member is added to a Security Group, the member receives an invitation email with a “Get Started” link that appears as follows. The member selects the “Get Started” link to initiate the login process.



Note: Owners can only add members if the member email domain has been approved by DHCS. If the member email domain is not approved, owners receive the following error message when trying to add a member. To add the email domain of the member to the pre-approved list, contact the application support staff. Application support contacts are listed on the DHCS Application Portal website, under Help.

Add members

NewUser@TestOrg.com

 NewUser@TestOrg.com External user ...

Include a person message with the invitation for external users only.

Add Cancel

Add members

NewUser@TestOrg.com

Not all members were successfully updated group membership, click OK to see details.

Include a person message with the invitation for external users only.

OK

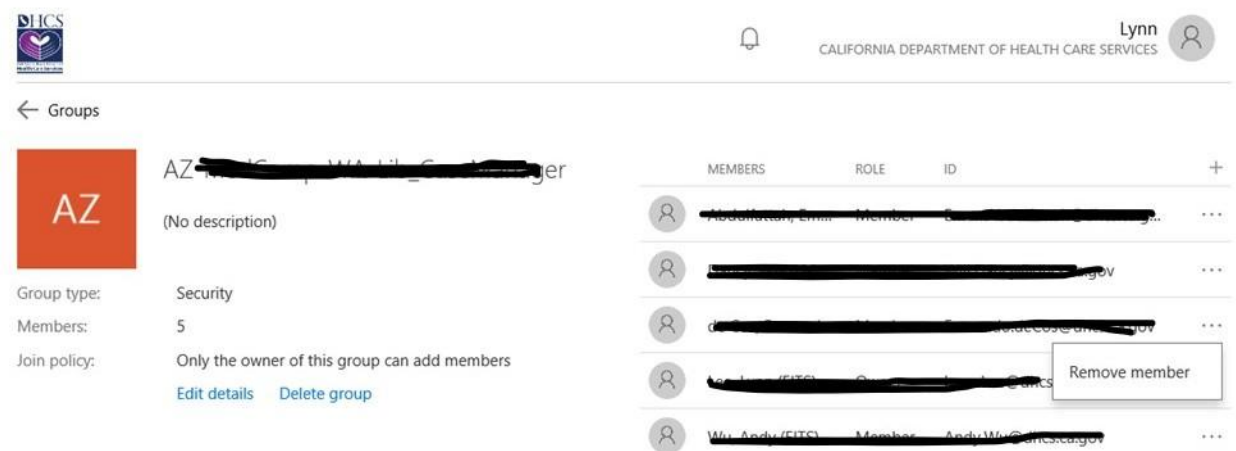


! User NewUser@TestOrg.com could not be invited right now. Your organization does not allow collaboration with the domain of the user you're inviting. Contact your admin to allow collaboration with this domain.

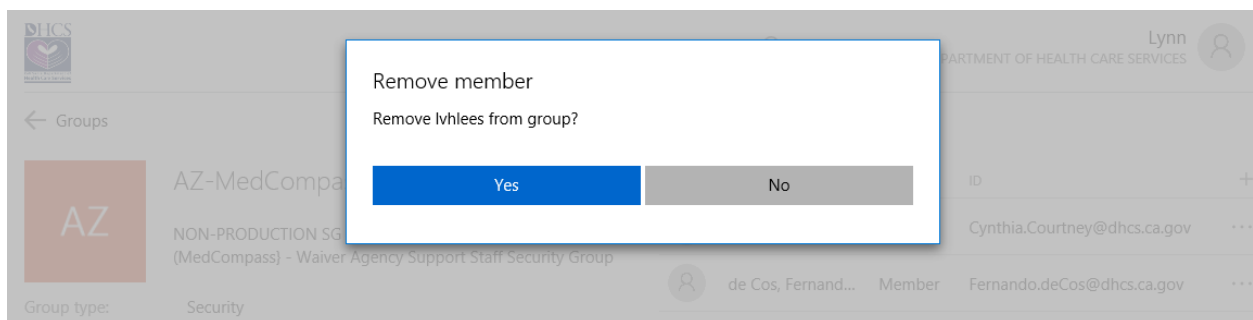


Remove a Member

1. On the Groups page, from the **Groups I own** column, select the group you want to remove member(s) from.
2. On the specific security group page, Click ... next to the Member you want to remove.
3. Select Remove Member



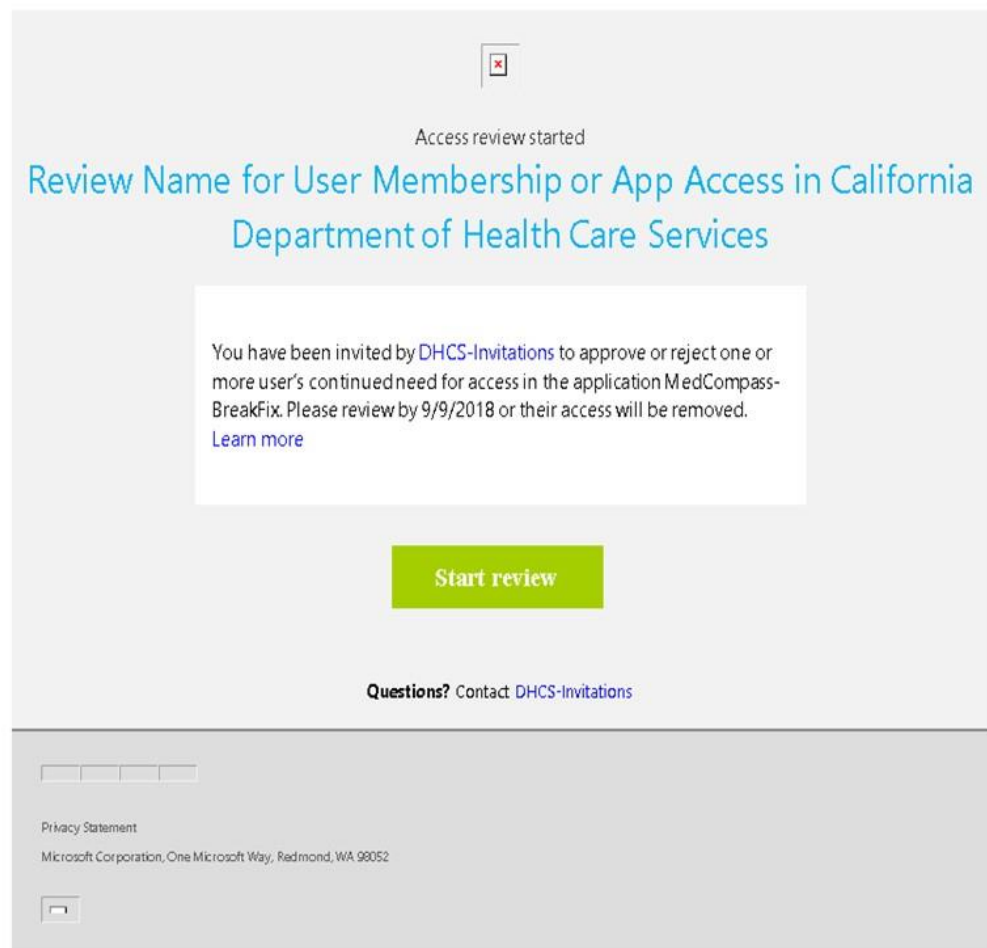
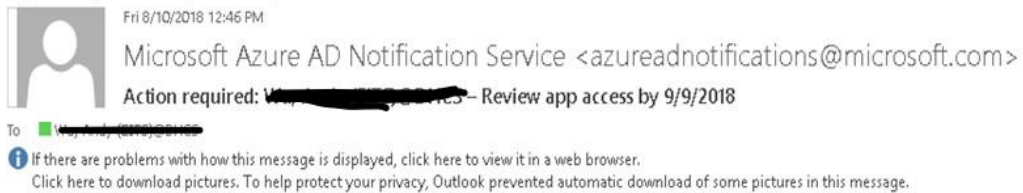
4. Remove member pop up will appear. Click Yes to Remove member.



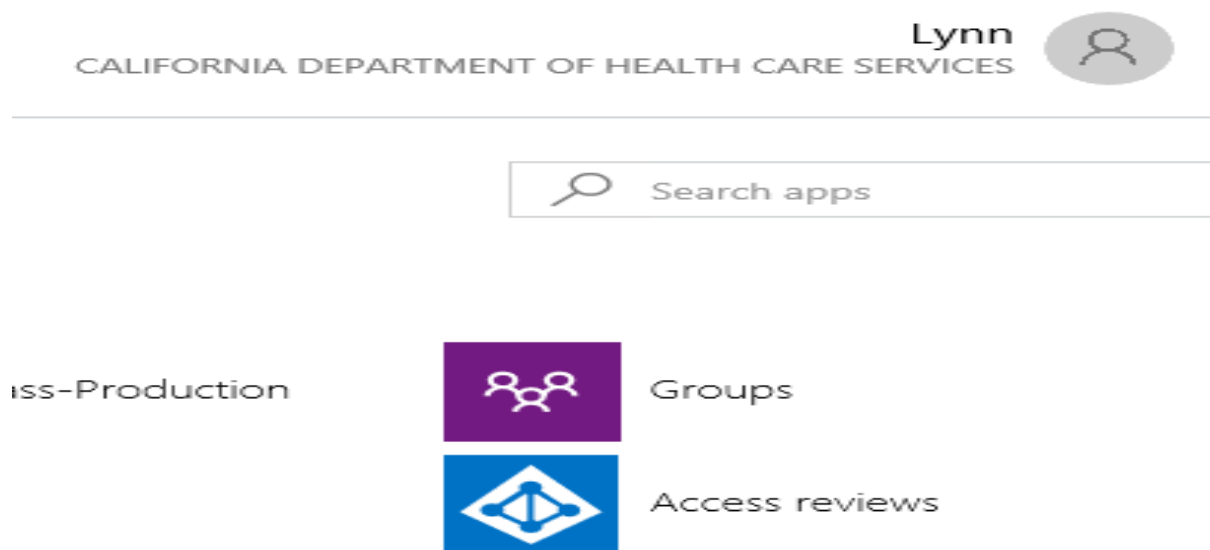
5. Once selected, Groups page will refresh
Member removed is no longer in Group Members list.

Access Reviews

1. When an Access Review is initiated, Security group owners will receive an email from Microsoft Azure AD
2. Click Start Review link in email from Microsoft Azure



Note: You can go to the Access Review area from the MyApps page. When an Access Reviews is in progress, a tile labeled Access reviews is displayed on the right side of the MyApps page. If the tile isn't visible, there are no access reviews to perform and no action is needed at this time.



3. Click Begin Review

4. If review is for multiple users, the following will display.

Click Recommended Action (*Approve, Deny, Don't Know*)



← Access reviews

MedComp [REDACTED] Review

Please review user members of 'AZ-MedComp-DHCS_CaseManager'

Search users

Due by July 26, 2018	Requested by DHCS-Invitations	Description
Progress 0 / 66	Program TestProgram	Other reviewer(s)

Status	Recommendation	Action
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<input type="checkbox"/> USER	ACCESS INFO	RECOMMENDED ACTION
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<input type="checkbox"/> [REDACTED] (SCD) Vanessa.Batancourt@dhcs.ca.gov	This user has signed in at least once in the last 30 days.	Approve
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<input type="checkbox"/> [REDACTED] [REDACTED]@dhcs.ca.gov	This user has signed in at least once in the last 30 days.	Approve
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5. Enter *Reason* for Recommendation Action and Click *Save*

The screenshot displays the 'Group Access Review' interface. At the top, there is a user profile section with a placeholder icon and a name that has been redacted with black boxes. Below this is a grey bar labeled 'Access info' containing the text: 'This user has signed in at least once in the last 30 days.' Underneath the grey bar is the 'Action to take' section, which includes three options: 'Approve (Recommended)' with a green checkmark icon, 'Deny' with a red X icon, and 'Don't know' with a question mark icon. The 'Approve' option is selected. Below the action options is the 'Reason' field, which is a text box with a red asterisk indicating it is required. The text inside the box reads: 'User continues to require access to this application and assignment to this security group based on their current job responsibilities.' At the bottom of the interface are two buttons: a blue 'Save' button and a grey 'Cancel' button. The 'Reason' text box is highlighted with a blue border.

YOU HAVE SUCCESSFULLY COMPLETED THE GROUP ACCESS REVIEW

Below is an example of a follow up email sent by Microsoft Azure when access review(s) are still outstanding.

